



Repstor affinity™

M-Files Connector Overview

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## 1 Introduction

The M-files connector for Repstor affinity provides uninterrupted access to an M-Files document management system using the intuitive folder hierarchy and functionality of Microsoft Outlook.

This guide will describe the functionality specific to M-Files, and should be read in conjunction with the Repstor affinity user guide, and installation and configuration guide.

## 2 Installing the M-Files Connector

The M-Files connector is a separate msi which can be installed manually after the main Repstor affinity has been installed. The msi must be installed with an elevated user account.

Both Repstor affinity and the M-Files connector can be installed silently or pushed out through SCCM and other mechanisms. All configuration for the product can be set through group policy.

The M-files connector requires a local installation of the M-Files desktop functionality. To avoid user confusion, it is recommended that the M-Files out-of-the-box Outlook client is disabled if running Repstor affinity.

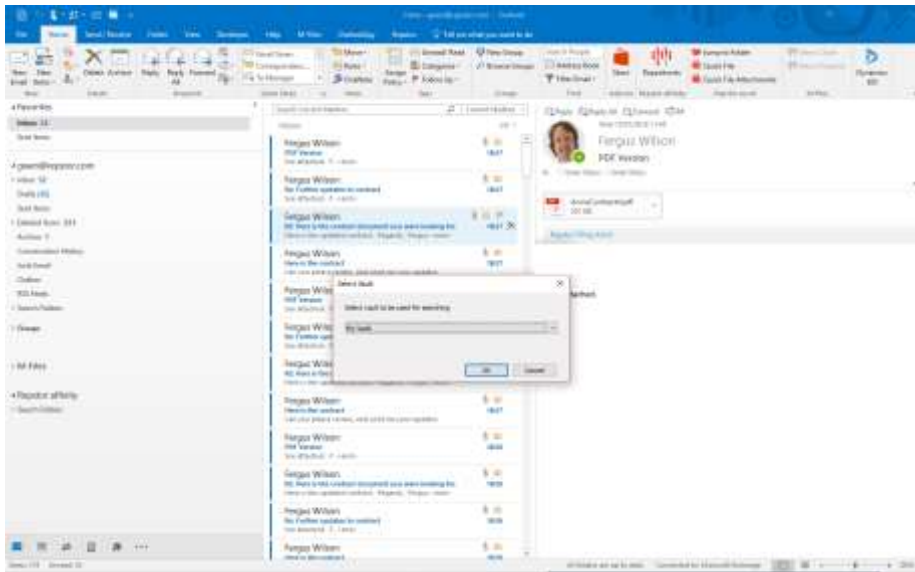
See the Repstor affinity Installation and Configuration guide for more information.

## 3 M-Files Dynamic Views within Outlook

Repstor affinity gives access to selected areas within the M-Files dynamic view hierarchy using a separate Outlook message store. The hierarchy is available for users to browse content, file new documents and emails.

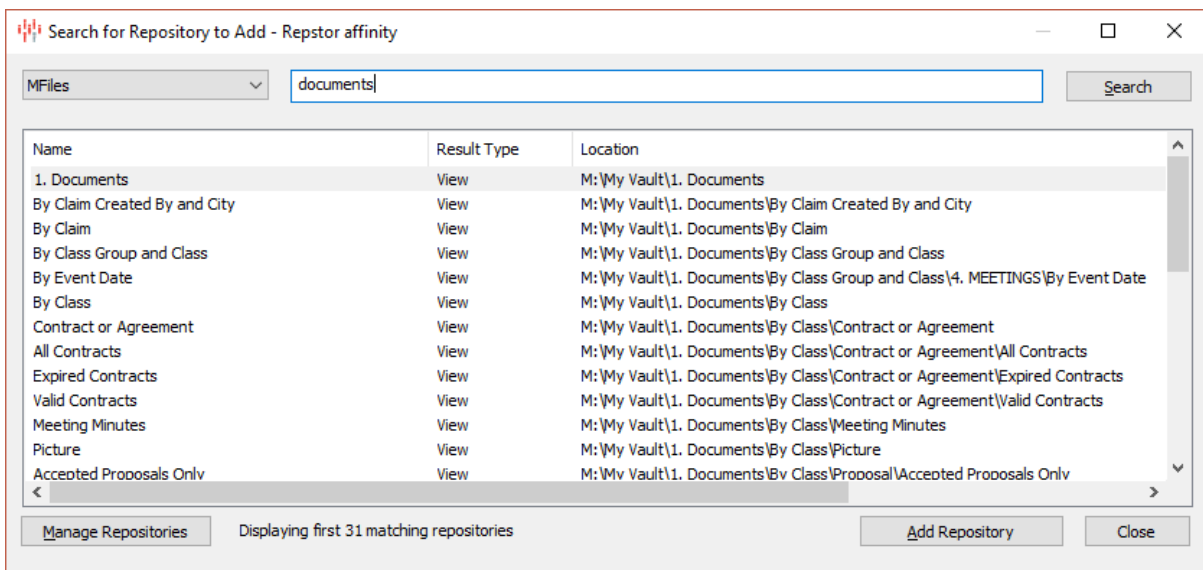
### 3.1 Connecting to an M-Files dynamic view

On first launch of Repstor affinity after installing the M-Files connector, if configuration has not been pushed out automatically, the user is prompted to provide the name of the M-Files workspace to which they will be connecting most frequently. The process automatically defines a Repstor affinity search scope, which will provide easy connection to the available views within the chosen workspace.

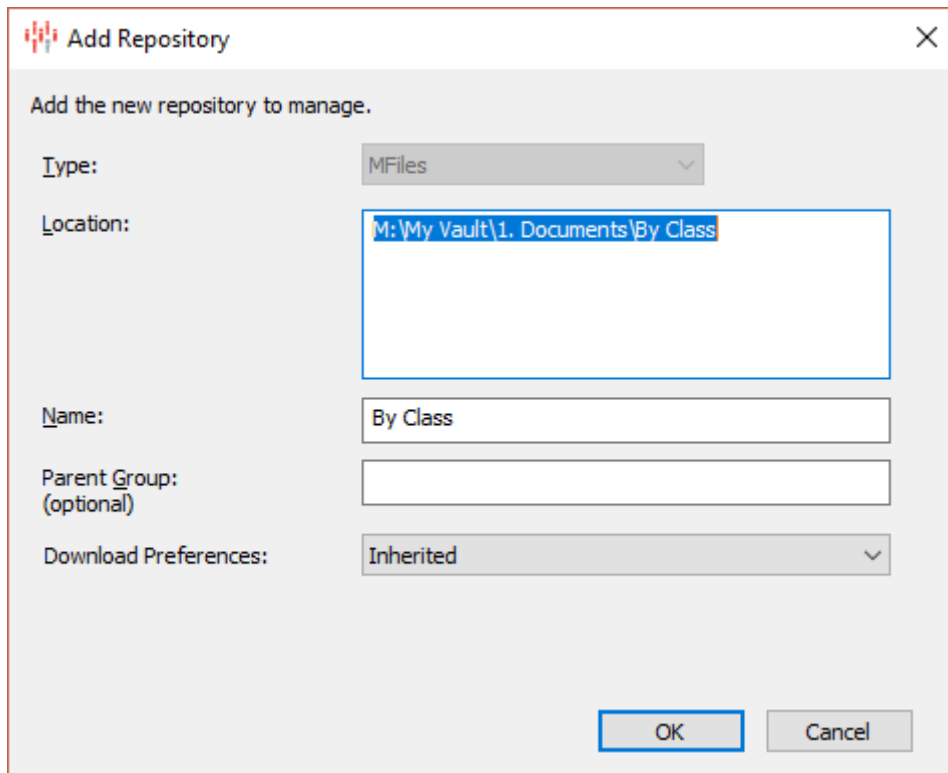


This configures a Repstor affinity search scope to allow users to connect to any M-Files view for which they have permission. To avoid each user having to select a chosen vault on startup, this can be pre-configured within the plugin scope

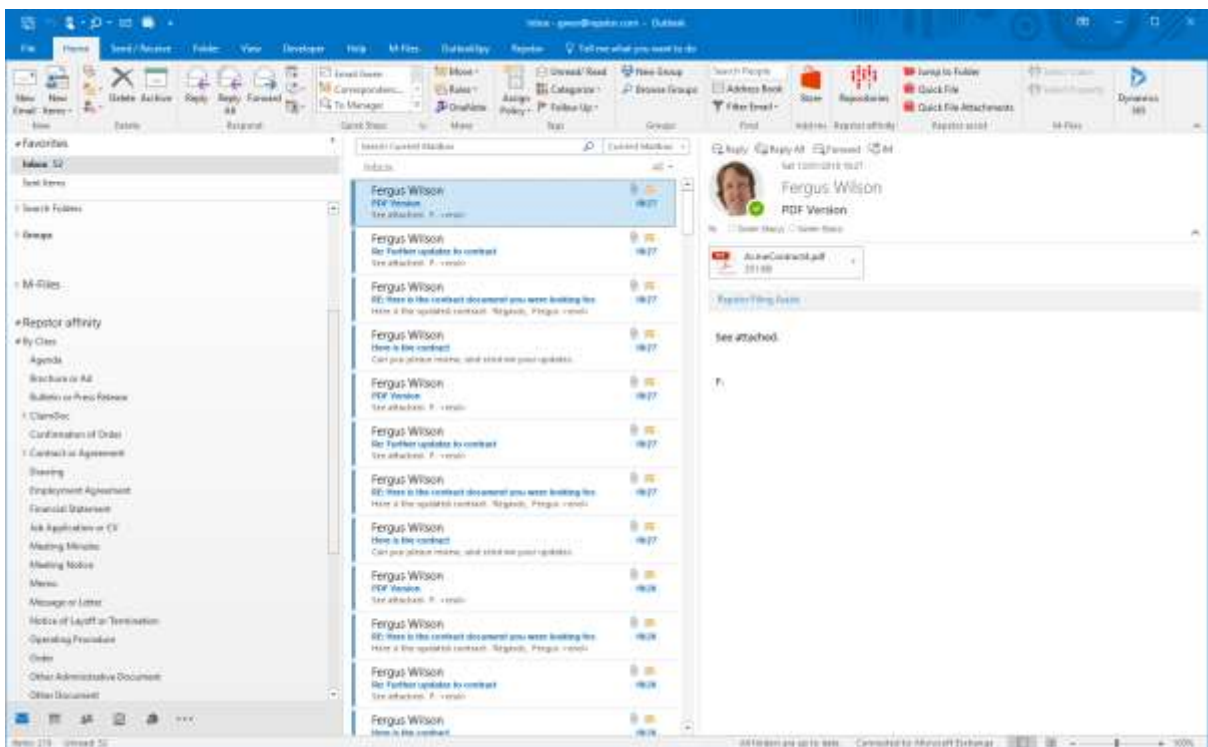
To connect to a view, the user can select the Repstor affinity Repositories button. This provides a search interface to find a view to which the user can connect.



Typing a word and clicking search will show views that contain that word. Selecting a view and choosing "Add Repository" will provide details of the view the user will connect to.



Selecting OK will connect that view to the folder hierarchy in Outlook.



### 3.2 Automatically adding views for a user

It is also possible to pre-configure the views that a user will automatically get access to within Repstor affinity.

Repstor extensions can be used to tailor the exact views that a user will see on first start up, or to change the views based on the requirements of the system.

(Future Release) By setting the registry setting “MFiles.DefaultRepository” registry entry or equivalent group policy setting to the location of the M-Files area to be synchronized, this will automatically be added for user’s Outlook when they start it for the first time after installation.

### 3.3 Accessing information within a dynamic view

Repstor affinity will synchronize the contents of a view as required, This includes the view level groupings, objects, documents and emails which are contained in the view.

The view information is brought unto Outlook, and is dynamically updated to reflect changes to the view within M-Files. This is done as the user browses through the folders, and on a background schedule. Repstor has a number of options for how to bring content into Outlook, including full content, header information only. It can also keep information just for the session(“online only”) or make it available all the time. Folders are automatically expired when the user has not been accessing them for a configurable period of time.

## 4 Content within M-Files

Repstor affinity is primarily focused on providing access to content (documents and emails) within the M-Files hierarchies. Content appears like emails within the Outlook list view. The appropriate M-Files columns (defined in the M-Files view) are also displayed in the Outlook list view. When an item is selected in the list view, its content will be displayed in the Outlook preview.

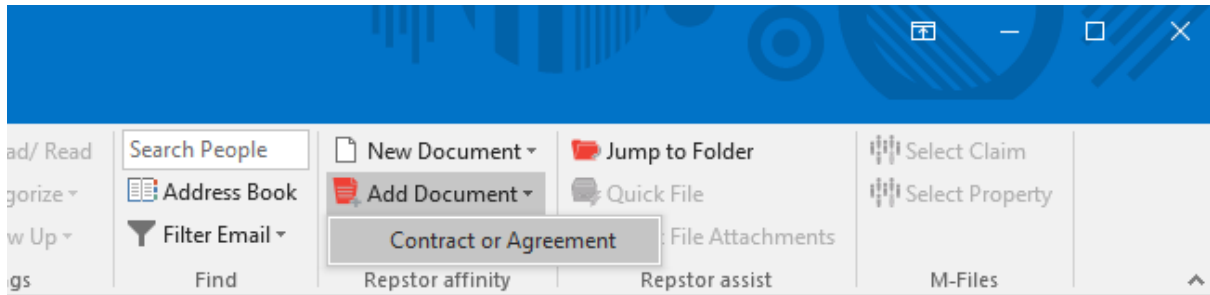
For all content, the standard Outlook reply, reply all and forward functionality can send the M-Files content to other users.

Additional functionality is available for documents.

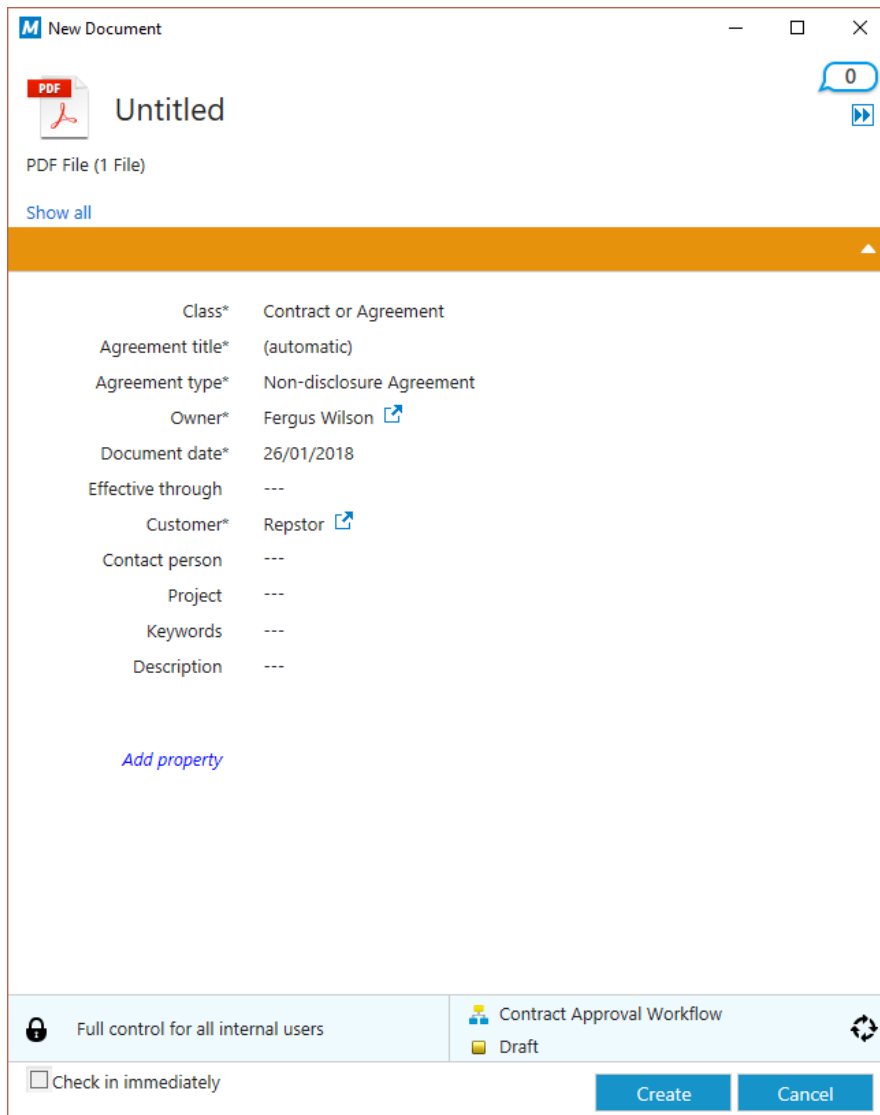
Edit Document will launch the document into the associated application, and allow its content to be edited. These changes will be reflected in M-Files as a new version.

Edit Properties will launch the M-Files metadata card for the object, and allow the properties to be changed.

New documents can be added with the “Add Document” menu. This menu displays the M-Files classes of documents that can be created at the current level.

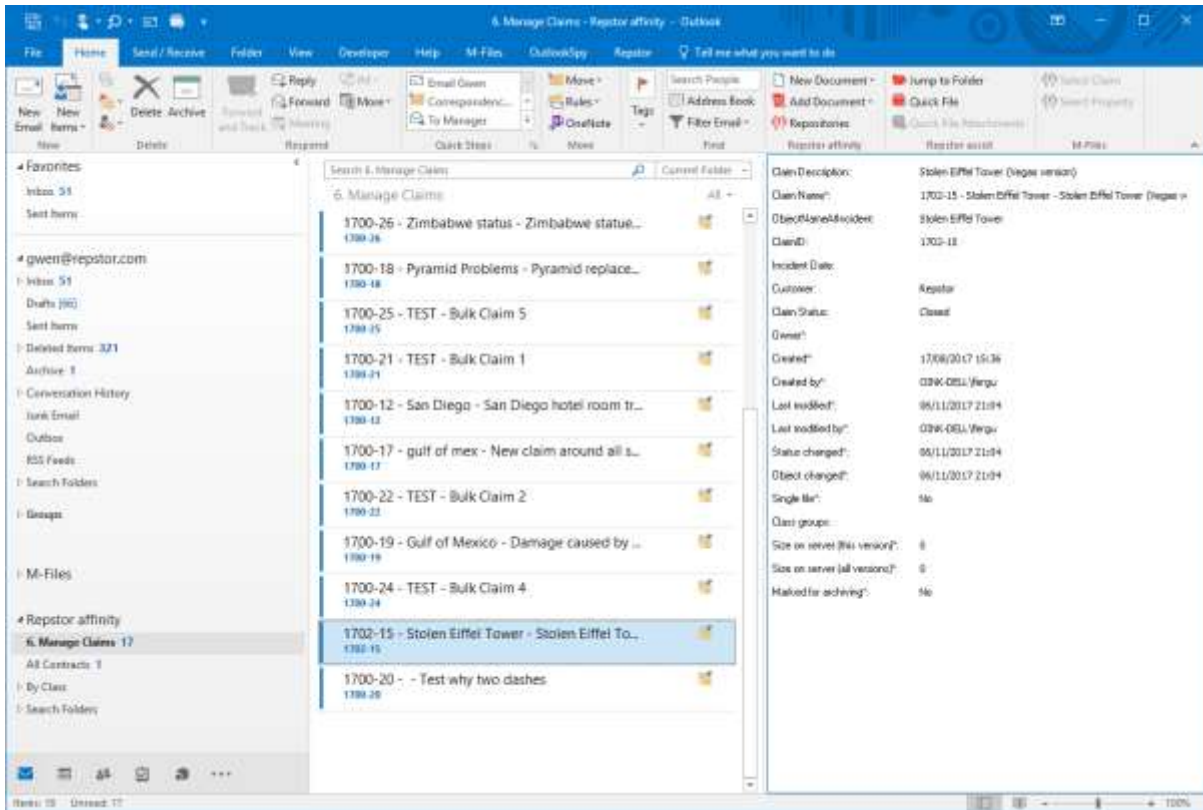


On selecting the class, the user is prompted for the file to add (In future releases this may be done through the metadata card only), and the M-Files metadata card is displayed.



## 5 Objects within M-Files

It is also possible to synchronize M-Files objects into the Outlook folder view. These appear as Outlook list items, with the configured M-Files columns displayed. The full properties associated with the item are displayed in the Outlook preview pane.



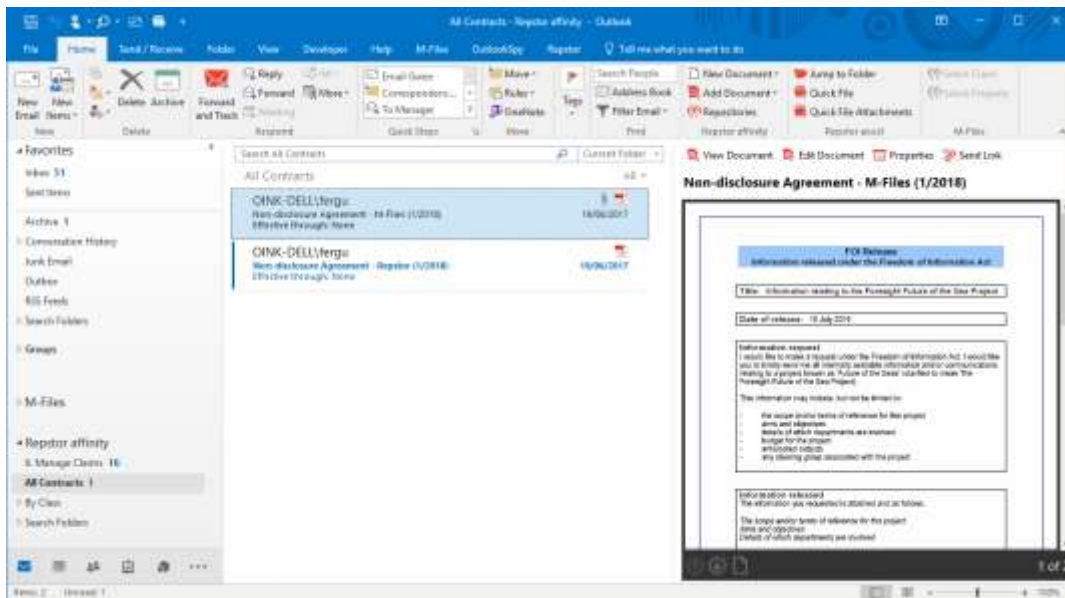
Selecting Edit Properties will launch the M-Files metadata card for the object, and allow the properties to be changed.

The add document menu in this case will launch directly into the M-Files metadata card allowing a new object to be created.

## 6 Outlook Views

The Outlook list view will reflect any custom columns configured within the equivalent M-Files view.





## 7 Configuring Tag filing for emails

Tags can be configured for allow email thread filing. Send and tagging requires a Repstor assist license for it to work successfully.

The following configuration settings must be set for this to work. These can also be done through group policy:

Assist.LuggageTagFirm – a three letter acronym to identify the home organization uniquely (e.g. REP for Repstor)

Assist.LuggageTagProperty – a property to use to identify the folders uniquely so that thread filing can take place.

Assist.LuggageFolderHints (Optional) – the name of a sub folder which will be used in combination with the Assist.LuggageTagProperty to identify the folder the tag is aimed at.

IndexFolderProps.MFiles – this should be set to the same value as Assist.LuggageTagProperty. It will ensure the property is included in the Repstor folder index.

IndexFolderProps.ExtraColumns (Optional) to display extra properties in the quick file screen. E.g. NAME\_COL=250,MFiles-Matter Code =150-Matter Code,FOLDER\_PATH=550

Once these properties are configured – after reindexing the folder index will allow thread filing to work successfully. Send and Tag will now appear as an option in the Send And File/Tag screen.

If there is not a direct mapping for a luggage tag to an M-Files property – it is possible to use extensions to extract a value for the luggage tag property. Contact Repstor support for help in configuring this option.

## 8 Adding Additional M-Files content

### 8.1 Showing documents for a particular object

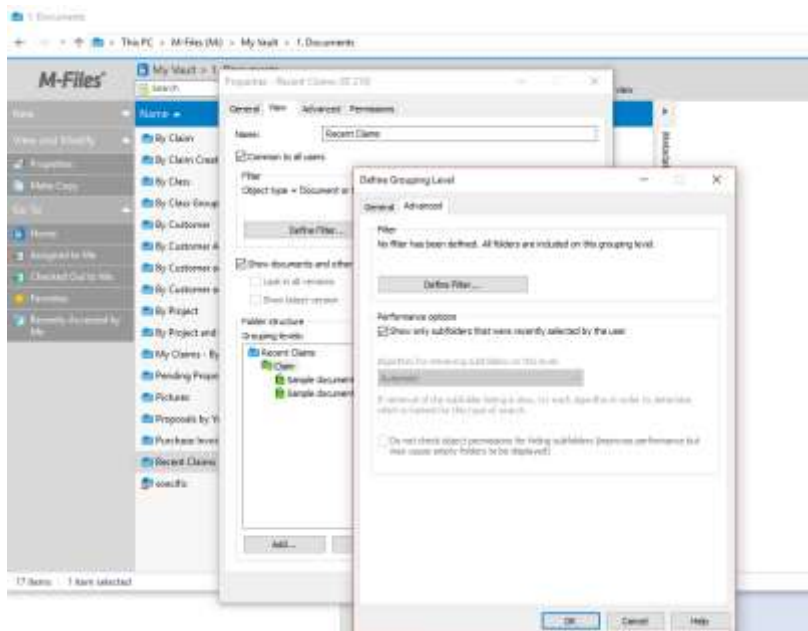
In addition to the search scope setup on installation, that allows searching for views on a particular vault, other search scopes can be configured to allow searching for different types of M-File content to be added to the Outlook navigation panel.

Different types possible are:

- 1) Searching by a particular vault's views
- 2) Searching by object type, then showing documents related to the object.
- 3) Searching by object type, then showing documents of a particular class for the object
- 4) Searching across the M: drive
- 5) Details of configuration of these search scopes is covered in Appendix B.

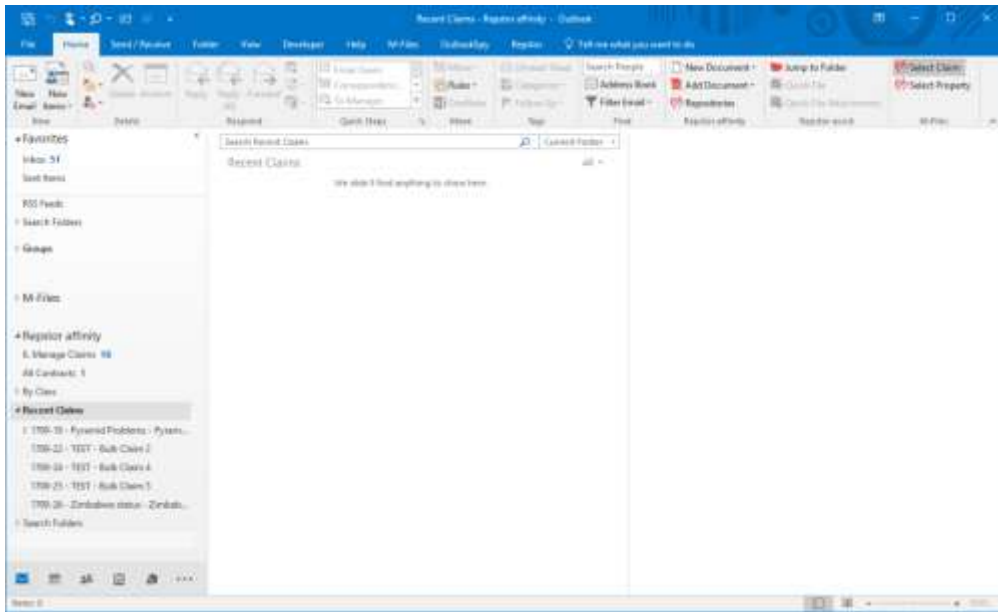
### 8.2 Dealing with views configured for Recently Selected items

For large numbers of items, M-Files allows you to configure a view level to show only subfolders that were recently selected by the user.

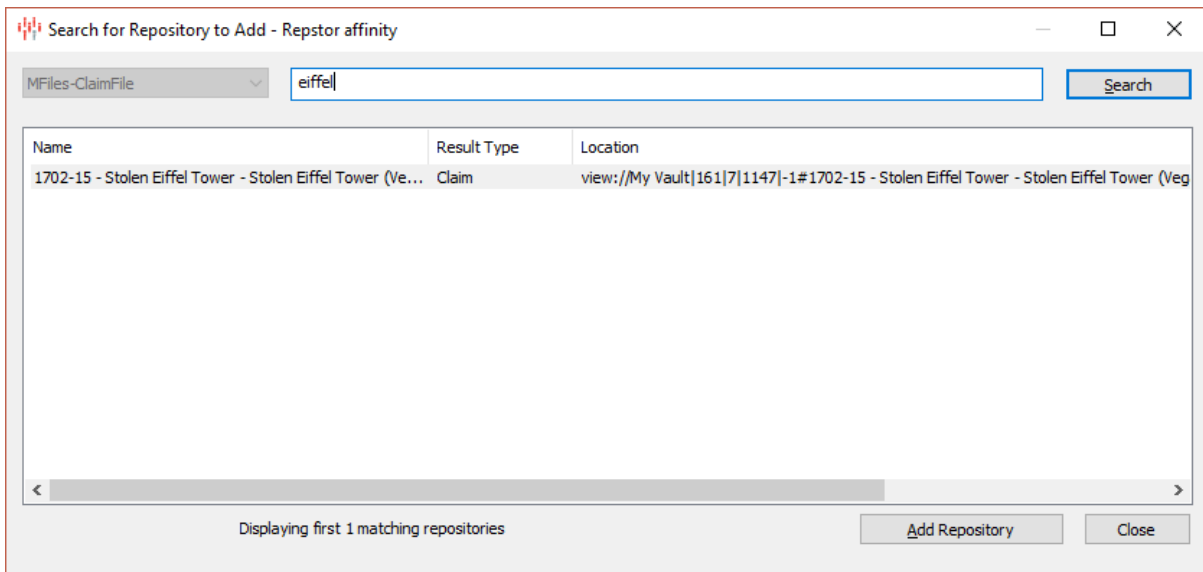


These areas will appear in Repstor initially as blank folders.

With configuration, it is possible to allow the user to add folders by selecting those folders they want to add.



By choosing “Select Claim” in the above ribbon, the user is prompted to search for claims to add.



Once they select a claim, it is added to the recent folders, and displayed in Outlook’s folder tree.

- ◀ Repstor affinity
  - 6. Manage Claims **16**
  - All Contracts **1**
  - ▷ By Class
  - ◀ **Recent Claims**
    - ▷ 1700-18 - Pyramid Problems - Pyram...
    - 1700-22 - TEST - Bulk Claim 2
    - 1700-24 - TEST - Bulk Claim 4
    - 1700-25 - TEST - Bulk Claim 5
    - 1700-26 - Zimbabwe status - Zimbab...
    - 1702-15 - Stolen Eiffel Tower - Stolen...
  - ▷ Search Folders

Configuring this mechanism requires changes to the Repstor extensions. This is covered in Appendix C.

## 9 Limitations within current version of M-Files connector

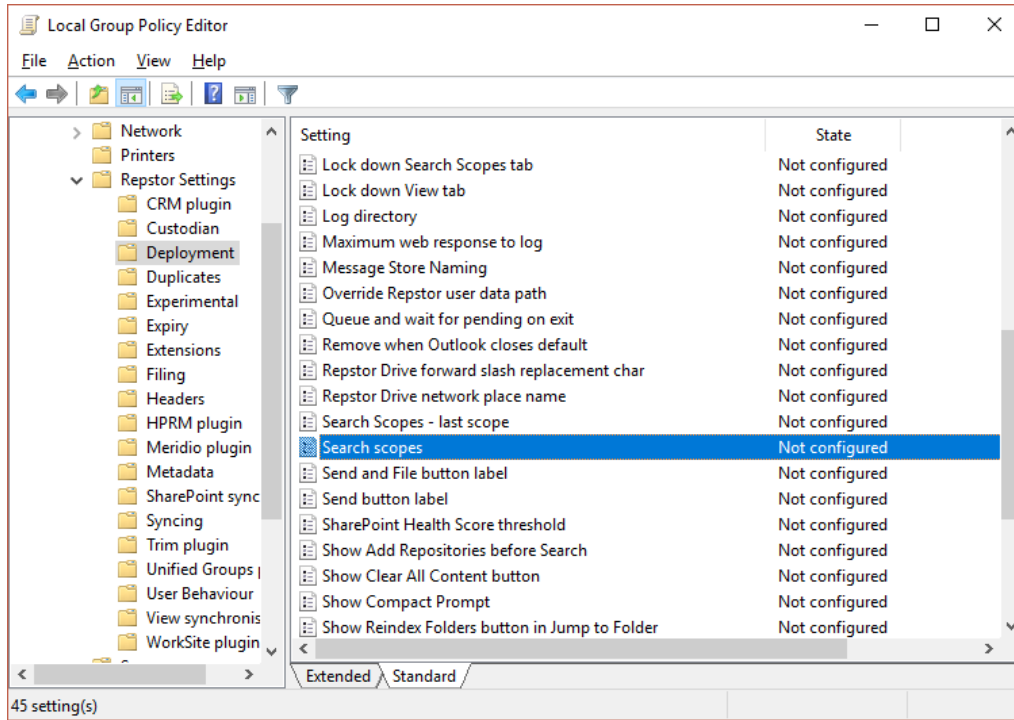
Some limitations exist in the current Repstor M-Files connector. These will be resolved in subsequent releases:

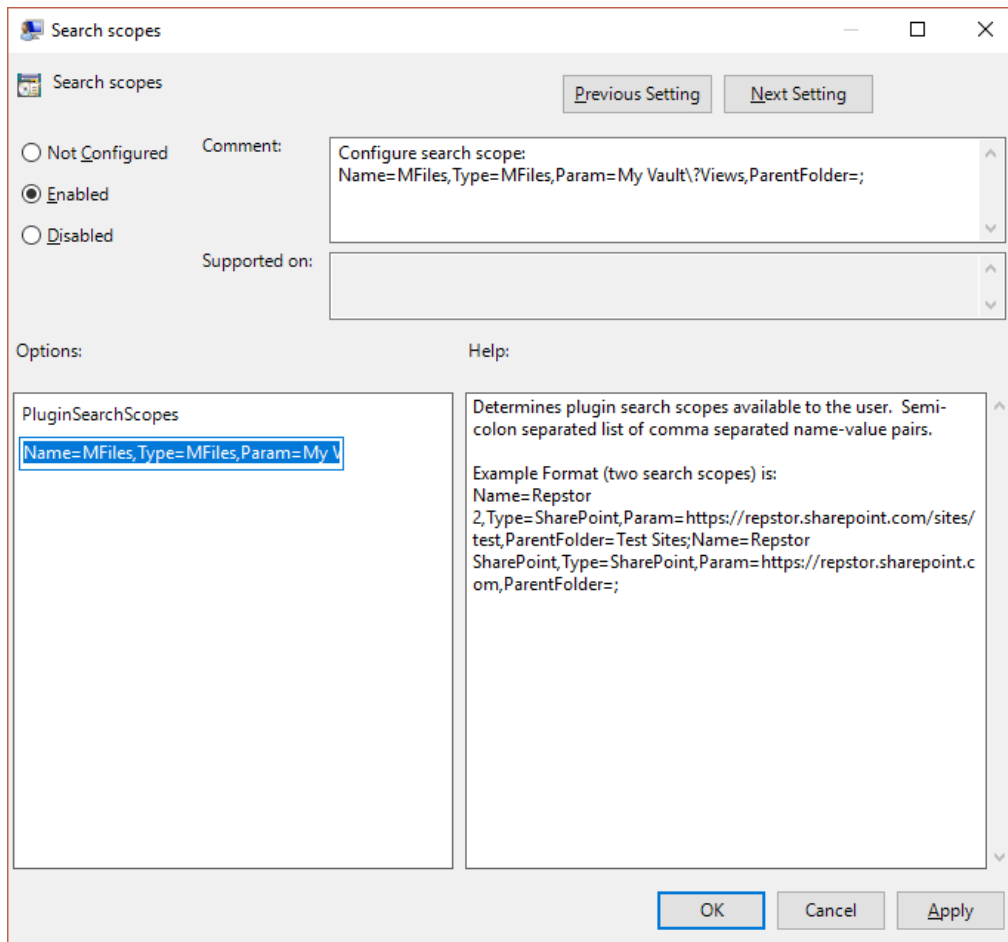
1. The user must be online to edit the properties of an item
2. The user must be online to edit the content of an item, unless it is available already within the M-Files M Drive location.
3. If the edit properties functionality is used, changes to properties will not be reflected in Outlook view columns unless the content of the document is changed as well.
4. If the same email is filed (or tag filed) by multiple users within a short period of time, duplicates will be created in M-Files repository. These can be identified by duplicate message id properties.
5. When documents are added using the “Add Document” menu item, the user is prompted for the document location, and then the metadata card is displayed. In future releases, this will all be done within the metadata card
6. It is possible through the M-Files view mechanism to bring a large amount of content into Outlook. This should be avoided by connecting to specific views (and not top level “all items”-style views).
7. For content, the connector uses the M-Files M drive to understand the content of folders within M-Files. This has limits over the amount of items displayed within a single folder.
8. If required properties are needed for a particular object class – and those properties cannot be calculated by the view location, then the user will be prompted for the properties during the synchronization of the folder. This synchronization will stop other folders from being synchronized until the user completes the metadata card.

## 10 Appendix A

### 10.1 Group Policy settings

Define a search scope for all users through group policy settings.





## 11 Appendix B

### 11.1 Searching for Views

Search scope format:

<vault name>\?Views

### 11.2 Searching for Documents associated with a particular Object

Search scope format:

<vault name>?ByView=<view name>

Example:

My Vault\?ByView=6. Manage Claims

### 11.3 Searching for Documents of a particular class associated with a particular Object

Search scope format:

<vault name>?ByView=<view name>#<item class>

My Vault\?ByView=6. Manage Claims#ClaimDoc

### 11.4 Searching the Vault's entire path

My Vault\01. Documents\Acme Documents

(Note: use of this can have performance implications)

## 12 Appendix C

Setting up Recent items views.

Please contact Repstor support for help in setting up recent item views.